


SCHEDULING AND VIEWING REPORTS

SCHEDULE A REPORT

What You Need to KNOW	What You Need to DO
<p><u>Purpose:</u></p> <p>The purpose of this procedure is:</p> <ul style="list-style-type: none"> To schedule a report in EAGLS using the online reporting tool To select a default report viewer and customize the reports menu using the Options screen <p><u>Rules:</u></p> <p>The following rules apply to this procedure:</p> <ul style="list-style-type: none"> You can select a default viewer for reports in the Options window, eliminating the need to select a viewer each time you schedule and run a report. (Info Analyzer is the initial default.) Once you set the default, every report you run will be generated in that format. <p><i>Notes:</i></p> <ul style="list-style-type: none"> <i>The default setting is not permanent. You can return to the Options window to change the default at any time.</i> <i>Even though you have set the default for all reports, you have the option of changing the viewer option for specific reports. (See VIEW A REPORT in this Job Aid)</i> You can customize your Reports menu to display only the reports you use most frequently. In the Options window, simply select which reports you do not want to appear by checking off the appropriate report names. This will save time for users who have access to a large number of reports. Hierarchy numbers are prefilled for the majority of users. You can easily change the pre-filled numbers by simply typing over them. 	<p>SCHEDULE A REPORT</p> <ol style="list-style-type: none"> From the EAGLS Main Menu, click on Reporting Tool. <u>Result:</u> The EAGLS Reports window displays, replacing the main EAGLS window. To change the default viewer, do the following: <ol style="list-style-type: none"> Click on Options on the Reports menu. <u>Result:</u> The Options window displays. In the Default Report Viewer field, click the down arrow  to view the list of available report formats, then click on the appropriate format. <u>Result:</u> The format you selected displays in the field. Click the Submit button to initiate the change. <u>Result:</u> Every report you generate will be in the format you selected as the default, until you change the default again. Note: On the Details window for each report, you have the option of changing the viewer for an individual report without changing the default for all reports. <p>Otherwise, go to Step 4.</p> To customize the Reports menu, do the following: <ol style="list-style-type: none"> Click on Options in the Reports menu. <u>Result:</u> The Options window displays.



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<ul style="list-style-type: none"> You cannot schedule a report if you enter incorrect parameters. For any incorrect parameters entered, you will be prompted with an error message and the incorrectly completed field(s) will be highlighted with a red asterisk. Depending on the report, the system checks the following parameters to make sure the values entered are valid and entered in the correct format: <ul style="list-style-type: none"> Hierarchy sets, if you manually entered hierarchy numbers Date values MCC codes Account numbers If you select a schedule time that is prior to the current time, the report will be scheduled for immediate generation. 	<p>SCHEDULE A REPORT - <i>continued</i></p> <p>B. In the Select Reports You Do Not Want to See section, click on the check box beside each report title you do not want to appear on your customized Reports menu.</p> <p><u>Result:</u> The check boxes beside the options you selected have a <input checked="" type="checkbox"/> in them. (Click again on a selection to remove the <input checked="" type="checkbox"/>)</p> <p>C. Click the Submit button for the changes to take effect. Note: <i>You must click 'Refresh' on the tool bar to see the new menu.</i></p> <p><u>Result:</u> The Reports menu on the left side of the screen will change to reflect only the reports you selected.</p> <p>Otherwise, go to Step 4.</p> <p>4. Click on the <input type="button" value="+"/> beside the appropriate report category on the Reports menu.</p> <p><u>Result:</u> The drop down list of report types within that category displays.</p> <p>5. Click on the appropriate report type.</p> <p><u>Result:</u> The summary window for that report displays.</p> <p>Note: <i>If no report has been previously scheduled, it will read "No Instances Found". If a report has been previously scheduled, display will show status, start and end time and size of report.</i></p> <p>6. Click on the Schedule link in the top right of the summary window.</p> <p><u>Result:</u> The Schedule window displays.</p> <p>7. The appropriate hierarchy numbers in the HL1 – HL8 fields are pre-filled. However, if you wish to change the pre-filled values in these fields, simply type over them.</p> <p>Note:</p> <ul style="list-style-type: none"> <i>You can only schedule reports for valid hierarchy numbers to which you have access.</i> <i>Some reports may not require hierarchy numbers. If so, go to Step 8.</i>

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

What You Need to KNOW	What You Need to DO
	<p>SCHEDULE A REPORT - <i>continued</i></p> <p>8. In the All Levels field, select Yes or No.</p> <p>Note: Selecting Yes indicates you are requesting information on accounts from all hierarchies below the highest level displayed. Selecting No indicates you are requesting information from only the hierarchy levels displayed in the HL fields.</p> <p>9. In the Sorting field, click on the down arrow  to display the list of available sort criteria and then click on the appropriate criteria.</p> <p>Note: Sort criteria varies depending on the report you are generating. (See the REPORTS FUNCTIONALITY MATRIX Job Aid)</p> <p>10. In the Time field, Now is the default selection to run the report at the current time. If you want to schedule the report for another time and date, click on the At button and complete the time and date fields.</p> <p>Note: Time must be entered in 24-hour formation Greenwich Mean Time (Ex: 1:30 p.m. is 13:30). Go to the GCSU Technical Help Desk Website at www.gcsuthd.bankofamerica.com to obtain the GMT. Date must be entered in MM/DD/YYYY format.</p> <p>11. In the Recur field, click the down arrow  to view the available options and then click on the appropriate option. Available options are:</p> <ul style="list-style-type: none"> ◇ Once only ◇ Every week ◇ Every month ◇ Last day of every month. <p>Note: Some reports may have additional prompts based on type of report. The Last day of every month option is useful if you are scheduling a report to run monthly and the last day varies depending on the number of days in the month.</p> <p>12. Click the Schedule button.</p> <p><u>Result:</u></p> <ul style="list-style-type: none"> ◇ If all of the entries and selections you made are valid, EAGLS schedules the report and the report summary window displays, from which you can view the report. (see VIEW A REPORT in this Job Aid)

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What You Need to KNOW	What You Need to DO
	<p>SCHEDULE A REPORT - <i>continued</i></p> <p>Note: <i>If the scheduled time is past and you do not see your report listed, click the Refresh link at the top right of the window to update the listing.</i></p> <ul style="list-style-type: none"> ◇ If you entered an invalid hierarchy number, date, MCC code, or account number, an error message displays and the incorrectly completed fields are highlighted with red asterisks. Go to Step 13. ◇ If report status is failed, click on Details hyperlink to view status reason. <p>13. Correct all invalid field entries and click on the Schedule button again.</p> <p><u>Result:</u> EAGLS schedules the report and the Report Summary window displays</p> <p>14. Repeat Step 13 until all fields and selections are valid.</p>



SCHEDULING AND VIEWING REPORTS

RESCHEDULE A REPORT

What You Need to KNOW	What You Need to DO
<p><u>Purpose:</u></p> <p>The purpose of this procedure is:</p> <ul style="list-style-type: none"> To reschedule a report <p><u>Rules:</u></p> <p>The following rules apply to this procedure:</p> <ul style="list-style-type: none"> You can easily reschedule a report based on an existing report by clicking on the Reschedule link for that report instance. Once the Schedule window displays, you have the option of changing any of the parameters in the fields you completed for the previous report, as well as the viewing option, before the report is rescheduled. 	<p>RESCHEDULE A REPORT</p> <ol style="list-style-type: none"> Click on the  beside the appropriate report category on the Reports menu. <p><u>Result:</u> The drop down list of report types within that category displays.</p> Click on the appropriate report type. <p><u>Result:</u> The summary window for that report displays.</p> Click on the Details link for the appropriate report instance. <p><u>Result:</u> The Details window for that report instance displays.</p> If you want to change the viewer selected for this report instance, click the down arrow  in the View field to view the list of available report formats, then click on the appropriate format. <p><u>Result:</u> The format you selected displays in the field.</p> <p>Note: <i>This does not change your default viewer.</i></p> Review the report parameters to note any changes you want to make, then click the Reschedule link at the top right of the window. <p><u>Result:</u> The Schedule window for that report instance displays. The screen prompts are pre-filled with the information from the report instance you chose to reschedule from.</p> Make any necessary changes to the report parameters, then click the Schedule button. <p><u>Result:</u> If all the parameters you entered are valid, EAGLS reschedules the report based on the existing report instance and the report summary window displays, from which you can view the report. (See SCHEDULE A REPORT and VIEW A REPORT in this Job Aid).</p>

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VIEW A REPORT

What You Need to KNOW	What You Need to DO
<p><u>Purpose:</u></p> <p>The purpose of this procedure is:</p> <ul style="list-style-type: none"> To view an EAGLS report using the available formats To print and save an EAGLS report in the selected format. <p><u>Rules:</u></p> <p>The following rules apply to this procedure:</p> <ul style="list-style-type: none"> Depending on your data reporting needs, you can select any one of the following formats in which to view a report: <ul style="list-style-type: none"> Info Analyzer Microsoft Word Microsoft Excel HTML Text Rich Text Format (RTF) Comma-Separated Values (CSV) <i>(encloses alphanumeric field data in quotes and separates fields with commas)</i> Data Interchange (DIF) <i>(often used for the transfer of data between different spreadsheet programs)</i> Lotus 1-2-3 Raw Data <i>(for selected reports only)</i> <i>Note: This is an advanced feature intended for experienced users. (Refer to the RAW DATA REPORT FORMAT Job Aid)</i> It is not necessary to select a report viewer each time you run a report. You can set a default viewer in the main Reports window. (Info Analyzer is the automatic default.) Once you set the default in the main window, every report you run will be generated in that format, unless you change the format for a specific report instance. You have the option to change the viewer for specific report instances from the Report Details window. This will only affect that specific report and will not change the default for any of your other reports. 	<p>VIEW A REPORT</p> <ol style="list-style-type: none"> On the Reports Menu, click the  beside the appropriate report category. <p><u>Result:</u> The drop down list of report types within that category displays.</p> Click on the report type you wish to view. <p><u>Result:</u> The Report Summary window displays, listing each report instance along with start time, end time, and file size. For reports that were successfully run, a Success link displays in the Status column.</p> Click on the Success link in the Status column for the report you wish to view. <p><u>Result:</u> The Download window displays, containing information about the file size and estimated download time, and the report is downloaded.</p> <p>Note: <i>If the report does not automatically download, click the Click here to download file link.</i></p> To select a viewer other than the default for this specific report, do the following: <ol style="list-style-type: none"> Before clicking the Success link, click the Details link to the right of the appropriate report. <p><u>Result:</u> The Report Detail window displays.</p> Click the down arrow  beside the View button to view the available options, then click on the appropriate option. <p><u>Result:</u> The report displays in the selected format.</p> <p>Otherwise, go to Step 5.</p> Once you are viewing the report, you can print, save, or export the report using the Print, Save and Export functions in the viewing tool you selected. (See INFO ANALYZER Job Aid)